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## Minimum Standards as a First Step Toward Evaluation of Reference Services in a Multitype System

### ABSTRACT

In 1986, the Suburban Library System (SLS) adopted minimum reference standards for their eighty public libraries. Four years later, similar standards are in place for over 100 academic, school and special SLS members. In order to ensure that the standards are effective, a sanction of withdrawal of access to System Reference Service is invoked for those libraries where policy, staff training, or resources fall short of the required minimum. The development and implementation of the standards has been a cooperative effort of almost 200 libraries. The ramifications call for training workshops, core lists of resources, policy models, and evaluation instruments which can be used in the smallest member library. A basic evaluation manual for public libraries has been produced and is being tested as an effective method of introducing more sophisticated methods to libraries where evaluation has never been done before.

### BACKGROUND

*Technical Standards: An Introduction for Librarians* (Crawford, 1986). Would you really want to spend an hour reading a paper with a title like that? Are you already sliding down in your chair? Groaning inside?

I was, when I saw the same title on a book I had to read. But—paycheck at risk—I opened it to Sandra Paul's foreword, read the first sentence, and was hooked. "Standards aren't sexy," Paul wrote (p. v.). Every ensuing page proved Paul's point. Standards, indeed, are not sexy.

Both Paul's foreword and Walt Crawford's text were surprisingly fascinating and even enlightening, especially when applied to our own long-standing debate on the practicality and the prudence of standards as a measure of effective library service.

This paper is not about technical standards, but borrows the philosophy woven throughout Crawford's book. Standards, it explains, are something we live with every day, every hour—electrical plugs that fit the outlets, untainted chickens at the grocery store, ALA forms that are recognized in interlibrary loan departments across the country. If they are good standards, they simply serve to make us secure in a particular environment. If they are good standards, individual developments will emerge from them. Good standards do not stamp out initiative, do not suppress a capitalistic society, nor do they stunt the growth of the unique personality of an individual library. Good standards should make us comfortable. That view has done a lot to make me comfortable during these past seven years, as the Suburban Library System bit the bullet and adopted minimum standards for reference service in seventy-nine public, eleven academic, thirty-nine special, and fifty-one high school libraries.

## INTRODUCTION

### **A Volatile Decade at SLS**

Back in the early 1980s, the System, referred to locally as SLS, was facing another budget crunch. Every service was examined and, where tolerable, cutbacks were made. When member libraries looked at backup reference service, someone made the observation that the System Agency's load might be lightened if members truly provided basic reference service at the local level, leaving backup staff free to deal with reference queries that called for more specialized expertise and collections. It was the member libraries—though they were loathe to admit it a few years later—who first asked, "Is it I, Lord?" The problem was that many SLS libraries didn't have a clear idea of what others expected in the way of basic reference service. "Tell us," they said. "Tell us what it is and we'll do it." There was no problem—or so it seemed.

The problems came later. First, there was the commitment. The libraries adopted the 1984-89 Long Range Plan, which included an objective charging System staff "to set, in conjunction with membership input, minimum standards for reference services in SLS libraries, and to work cooperatively with local library staff to meet these standards." So far, so good. But the statement continues: "...and to enforce

implementation of mutually established levels of service by withdrawal of (backup) reference services from those not meeting minimum requirements."

Still, the voice of objectors was relatively faint. Standards, after all, are good. Every year there are new ones, from ALA committees, from education commissions, from state libraries. They describe what librarians do in lovely terms and, of course, we meet most of them anyway—well, we would meet them if we could just get that referendum passed, or if our director would just give us that extra staff person.

Perhaps they weren't listening. The committees which began to meet in 1984 were drawing up standards which were going to force those libraries to make decisions about their missions. This, it should be remembered, was long before PLA's role-setting guidelines. They were going to have to decide, "Are we going to provide full reference service for our patrons or not? If we can't answer a question in-house, will backup service be available to us?" This time, the standards had teeth.

By way of explanation to those readers who are not familiar with the Illinois library network: Our libraries are autonomous. Each library can choose to be a member of one of the eighteen Illinois systems and participate in the statewide network as well as receive system services, which are completely funded by the state. Even as members, however, they remain individual entities who control their own staffing, choose their own materials, and require or provide training as they see fit. There is no centralized purchasing and no centralized hiring. There are few centralized "rules," though in the past three years, we have seen more systems adopt requirements for membership. The philosophy that has always prevailed is that the members are the system; it is they who cooperatively develop and endorse system policies which will serve their best interests. That philosophy prevailed from the beginning in developing reference standards—but not everybody was listening.

The original Ad Hoc Committee on Reference Standards decided to address public libraries first. By September 1984, thirty-three libraries had volunteered committee members to serve with three separate working groups. One group would develop minimum standards on policies, another on staffing, a third on resources. Two persons from each group made up a coordinating committee which met with the SLS Reference Service Director.

The first task of the committees was a literature search. Frankly, although citations on standards were frequent enough, they could find nothing that indicated that any library group had been willing to set and enforce them. Existing standards were couched in terms general enough to allow interpretations that would ensure that everyone could

stay comfortable. If specifics were mentioned, they were "guidelines," and those who needed them most had no tangible reason to reach for them.

The SLS committees knew that the Long-Range Plan had predetermined sanctions, and while there were still those who preferred the guidelines approach, others were strongly in favor of sanctions. One reason was the philosophy that if a library chose not to meet this minimum level, they chose not to provide basic reference service, at least as we were to define it, and so had no need of backup service; the sanction, then, was not a slap on the wrist but a logical result of the library's right to make choices in service. Another philosophy was the "carrot on the stick." Ronald Dubberly (1988), in his article on potential public library accreditation, makes a point about the carrot theory. The effort of working for accreditation, he says, assumes that it is worth the investment (p. 56). Many members agreed with his thinking, believing that, without sanctions, our standards would be just one more pretty document.

Sanctions intact, by Spring 1985, the committees were ready to present their working drafts to the membership.

All of a sudden, everybody heard. These were not lofty ideals, guidelines, goals, or "pies-in-the-skies." These were specific, measurable standards, and nowhere in the document could anyone find the words "appropriate to" or "sufficient for." And if libraries did not meet every single requirement within three years, they would lose access to backup reference service.

It was a summer of meetings: big system meetings, little zone meetings—undoubtedly some unscheduled meetings over coffee, tea, and more. After all the discussions and further work by the committees, the final document was prepared and submitted to the membership in Fall 1985. Public libraries, which were directly affected, were asked to cast an advisory vote on whether or not it should be adopted by the SLS Board. At that time, public library members numbered eighty. The vote was 39-31 in favor of adoption, with ten abstentions. This was not exactly a grassroots call to action, but enough to convince a courageous SLS Board of Directors to adopt SLS Minimum Reference Standards for Public Libraries in January 1986.

Plans were immediately begun to develop standards for special libraries, adopted in 1987, then for academics in 1988 and high schools in 1989. SLS elementary schools are still eagerly awaiting their turn. All the documents are written in the same format with the same basic elements: policies, staffing, and resources. All have the same sanctions and the same period of implementation for libraries to meet standards



before sanctions are imposed: three years. There are, of course, important differences in specific requirements for different types of libraries, but consistency was a consideration where possible.

Because public library standards were the first to be adopted, these standards are the primary focus of this paper, although others will be mentioned. After five years, we have a better feel for how standards are working in the public libraries and—in some cases—how they are not working. In January 1989, when sanctions became effective, five of SLS' seventy-nine public libraries did not meet standards. By action of the SLS Board and after due process, they lost access to SLS Reference Service. This summer, halfway between the implementation date and the agreed-upon evaluation year of 1992, we did a survey of librarians' perceptions of the effectiveness of standards in their libraries. Those results are discussed later in this paper. What follows are some of the more important requirements of the standards and how they might affect future plans for evaluations. (Copies of SLS Minimum Reference Standards for all library types are available from SLS free of charge; they may be requested from SLS Reference Service, 9444 S. Cook Avenue, Oak Lawn, IL 60453.)

## THE REQUIREMENTS

### **A Written Reference Policy**

Without a written policy, the rest of the requirements would be empty efforts. We hoped, too, that emphasis on local policies would point up the complementary supports of regional standards and local service goals. Only nine SLS public libraries had written reference policies in 1985. Today, seventy-seven are on file in our office. They aren't all "model" policies; some are twenty pages long, some only one page. Clinics are offered on how to write policies, but no judgements on format or style are made once the policies have been submitted. The important point is that staff in every library have discussed what their service goals are, put them in writing, and had them approved or endorsed by their governing bodies. Such a process can only strengthen those unique personalities.

Each standards document calls for inclusion of policy statements on certain issues. Except for special libraries, the lists are quite similar, with an emphasis on primary and secondary clienteles in all but the publics. They ask for statements on such things as hours reference service is offered, trained staff, confidentiality, policies on special categories of questions—e.g., homework and criss-cross directories—and assurance of policy review and updating. They also call for periodic evaluation

of local reference service, a particularly difficult standard for many libraries to meet, and one which merits more discussion in the pages to follow.

Not surprisingly, more than two-thirds of SLS' public libraries had never attempted reference evaluation of any kind. They have counted, but they have not evaluated. Those who had were often victims of what Mackay (1988) refers to as the "Ready? Fire! Aim" approach, and were uneasy with results (p. 37). Again, they turned to system staff to tell them how.

The need for help was fairly urgent and none of us at SLS was an expert in what we were to learn was a very complex field. We attacked the problem with the usual cure—a committee. At first, it was a small committee, just three other people with the author as facilitator. Like good librarians, we began with a literature search. We certainly found plenty to read on evaluation—and had full shopping bags to prove it. (During that time, the author was asked to be a member of RASD's Evaluation of Reference Services Committee, and may have accepted just to have something to do with those shopping bags!)

The committee was disappointed with its findings. Some of what we found was the work of some of the readers of this paper. It was impressive, admirable, even enviable. But very little of it could be useful in SLS' small public libraries.

These small public libraries wanted it simple. They wanted forms. They wanted it easy to administer. They wanted it non-threatening to both staff and patrons. They wanted it private. And they wanted it cost-free. Impossible? Maybe. But we were in a situation where impossible wasn't an option. The Suburban Library System had adopted standards which required every library to evaluate, and the System does not require anything without offering support needed to do it.

The committee of three generated themselves into a committee of fifteen. We would produce something to help those libraries do what they had to do. The result was the *Reference Evaluation Manual for Public Libraries* (Suburban Library System, 1989), an in-house publication which has since been requested by several hundred out-of-house people. While the manual won't win the Dartmouth Medal, it is doing the job it had to do: getting some public libraries to at least begin to recognize that reference activity is as important to consider as circulation figures and story-hour attendance.

The committee's first step was a survey asking the libraries what they would like to know about their reference services. Their task was defined by the questions the libraries most wanted answered. They were:

1. Are our patrons satisfied with the answers we provide?
2. What subjects do people ask about most and can we meet those information needs?

3. How can the output measures of "Reference Completion Rate" and "Reference Transactions Per Capita" be used as evaluative measures?
4. Are our patrons getting accurate and complete answers?

The fifteen divided into groups of three, enlisted help from colleagues, and went to work.

No one expected the manual to be more than it was meant to be: a starting point for libraries where "evaluation," in the true sense of the word, is perceived to have no place in their priorities. Only the threat of losing backup reference service has urged them to try these first steps. In years to come, we must build some bridges between the researchers and the practitioners—somewhere we must find valid methods of evaluation that are acceptable to all public, school and academic libraries.

Meanwhile, we at SLS are learning that standards are a first step in themselves. Since they have become effective, and libraries have indeed tried some simple "count and compare" methods, they are reaching for something better, e.g., one group is collecting feedback from those using the manual, already looking toward a second edition that can offer more valid models; another group is investigating the possibility of doing an unobtrusive study on accuracy, patron satisfaction, referrals, and has even committed themselves to spending some significant dollars to do it.

A few years ago, when on the lecture circuit trying to convince SLS administrators of the value of formal evaluation, this author used what she thought was a "sure sell" technique. If (the audience was told) you are willing to admit that some of you might be providing "average" public library reference service, you are giving your patrons right answers only about 52 percent of the time. Suppose that you discovered that 48 percent of your books had the wrong Dewey numbers on the spines, or that 48 percent of the people who came to pick up reserves got the wrong material? As administrators, you would be hitting the roof and willing to spend whatever the cost to identify and correct the problem. How can you go on accepting a 48 percent fail rate in the most expensive operation in your libraries—your reference departments?

But the idea didn't sell—at least not with many of the administrators. Maybe they had never evaluated, but they knew one thing: those figures didn't apply in their libraries. What finally sold them was standards. With standards in place, libraries had to *do* something. It was as simple as that—and in some cases, appetites have been whetted. A few administrators are already beginning to build bridges toward those

impressive studies in the literature, but they're not going to make it all the way across without the help of the researchers who must meet them in midstream.

### Trained Reference Workers

All the standards include minimum formal education requirements for the person with principal responsibility for reference service, and a list of basic duties. Most of the controversy, however, arose over the training requirements for any person doing reference work, even if it were only for an hour on Wednesday nights.

Proceeding from the premise that *not* just anyone can answer reference questions, the standards require that everyone who is assigned that duty, professional and paraprofessional alike, attend a reference interview workshop. That requirement is common to all standards except specials, where CEOs are not friendly toward probing questioners. It was not a popular requirement with many old-timers. They've done it, though, and most have agreed that they gained from it. Since 1986, 874 SLS librarians have attended an interview workshop—some tailored for those who work with children, with students and faculty, or with the handicapped. As different sets of standards become effective, interview workshops will be a part of our schedules for years to come, and we continue to look for new approaches. For example, right now a workshop is being developed specifically for people who claim they "don't need an interview workshop." Because we know all reference staff have been exposed to good interview techniques, future evaluations of interpersonal skills will proceed from a common base.

Even more controversial than the interview requirement was the standard for training in reference sources for paraprofessionals. For purposes of the public libraries document, *paraprofessional* was defined as anyone without an ALA-accredited MLS. This meant that hundreds of circulation clerks, student helpers, part-time staff from the community, library school students, and even a few non-degreed administrators helping out at the reference desk had to attend at least four workshops in addition to the reference interview. Though no one believed that five workshops a reference librarian maketh, we did have a consensus that this was the necessary minimum to work behind the desk.

In 1985, many SLS libraries complained that they could not spare desk staff to go off to some far-flung suburb for a half-day—that they did not drive; that one or another had twenty years experience and would be insulted; that, in short, the training requirement was an impossible goal. As of this month, SLS has issued 385 certificates of completion to public library reference staff. It was hard, it took some effort, but it was not impossible after all.



In *Swim With the Sharks Without Being Eaten Alive*, Harvey Mackay (1988), referring to the four-minute mile, makes a point about the changing nature of the impossible. Some will remember that day when Roger Bannister shattered the centuries-old record and ran the mile in under four minutes—a feat runners had heretofore conceded could never be accomplished. One year after the Bannister miracle, thirty-seven people had run the mile in less than four minutes; two years later, 300 had done it (pp. 79-80).

Analogously, 385 reference librarians have broken our impossible “four-minute mile” training requirement. Judging from those attending their tenth or fifteenth workshop, the standard is a long-forgotten reason for coming.

## Resources and Equipment

Standards for public, academic, and school libraries all include a core reference list, drawn up by a committee specific to the type of library. It is not a recommended reference collection, but a list of things that even the smallest reference service should not be without. Some are specific titles, but most are subject areas for which any title will suffice, though many have currency requirements. If a library had to buy everything on the public library core list, they could do it for under \$3000. No one has had to spend even close to that, but 50 percent of SLS public libraries had to buy something in order to meet the standard. The lists are updated every two years, though we try hard not to give the libraries a moving target.

Not unexpectedly, the core lists differ significantly for the three types of libraries and not everyone agrees that every item is an absolute necessity. In one letter responding to the academic list, the librarian complained that he saw no need for a zip code directory in an academic library. His letter, however, got there too late to present to the committee—it was addressed to the wrong zip code!

Other resources requirements deal with local government documents, backruns of newspapers, voter information, and in-house access to a bibliographic database. Academic and special libraries also require in-house access to information databases, and all except public libraries call for a telefax machine. Some equipment standards have delighted librarians who have used them to finally get approval to add a photocopy machine, a fax, or (believe it or not) a telephone and authority to make outside telephone calls in pursuit of information.

Future evaluators will know that SLS libraries have a common core of resources and equipment that allows them to access a basic

body of information. (Copies of core reference lists for each library type are available for \$5, prepaid to Suburban Library System and mailed to SLS Reference Service, 9444 S. Cook Ave., Oak Lawn, IL 60453.)

### HOW ARE STANDARDS AFFECTING LOCAL REFERENCE SERVICE?

The long-term effects of these standards on local reference service is not yet known. Some good things have come of them, there's no doubt about that, but in the end the good will have to be great enough to justify the continued effort. SLS has scheduled a time for the libraries themselves to make that decision.

As mentioned earlier, each library has three years to meet standards before sanctions become effective. Three years after that, they will decide—in 1992 for the public libraries, 1993 for special libraries, 1994 for academic libraries and 1995 for high school libraries. Meanwhile, each library files with SLS its written policy and an annual report which indicates if they continue to meet standards and if they have reviewed their policy and evaluated their reference service. We keep a record of staff training, policy reviews, and evaluations, though there is no requirement that they share results. Other than that, we believe what they tell us—and, truth be told, sometimes wish they weren't quite so honest about their failings!

In 1989, our mettle was tested when five public libraries lost access to SLS Reference Service. In at least some of those five, we feel the libraries made a responsible decision, recognizing that their major role in the community did not include reference service as we defined it. Unfortunately, we haven't found a way to make all of them feel so good about it. In any case, it happened, and the roof at SLS is still intact.

We are busy now gearing up for D-Day in academic libraries and are expecting fireworks. Some of the academic libraries were every bit as resistant as the public ones, and SLS will face a difficult problem in high schools where release time to attend workshops is not easy to come by. But high schools, too, are working hard, and will have their chance to re-evaluate three years down the road.

Only now are we discovering our own mistake in not planning for those evaluations when we began the process. We should have done some measuring of reference services in system libraries before standards went into effect. We didn't, and that will make SLS' job harder in those telling years to come—but it is too late to wish we had known what we didn't know about evaluation. Like our libraries, we are learning a lot from the standards.

## An Interim Survey of Public Libraries

Perhaps to help make up for that omission, SLS has just recently done a halfway point survey of its public libraries, asking for their perceptions of how standards have affected their local services a year and a half after they became effective.

The surveys were sent to all libraries, including those which do not currently meet standards since, as members of SLS, they have a voice in their future. Return rate was 81 percent, quite good for members who have to make choices these days about how much more paperwork they can deal with.

The full results of the survey are in the Appendix to this paper. The most important are the answers to two basic questions:

IN GENERAL, DO YOU THINK SLS MINIMUM REFERENCE STANDARDS HAVE IMPROVED REFERENCE SERVICE IN YOUR LIBRARY?

Yes: 78%

No: 14%

Don't Know: 8%

WHETHER YOU ANSWERED YES OR NO TO THE ABOVE, WOULD YOU RECOMMEND SOME TYPE OF REFERENCE STANDARDS AS A GOOD IDEA?

Yes: 90%

No: 1%

Don't Know: 4%

Yes, but without sanctions: 5%

This response was from a group of libraries which, five years earlier, recommended standards by a majority vote of only 56 percent!

Survey results indicate that there are, indeed, a few requirements that, in practice, members do not consider either "vitally" or "very" important. Less than half consider the collection of local government documents worth the trouble and only 36 percent believe six-month retention of local newspapers is necessary to minimum standards. While more than 50 percent consider all other elements appropriate, not all are converts. Four percent think that a telephone has no effect on the quality of service; a few think formal education requirements and the Core Reference List have a negative effect because of costs involved.

## CONCLUSION

It appears evident that for the majority of SLS members, the development and implementation of minimum reference standards has been and is a worthwhile process. SLS libraries made a courageous decision in 1985 and have stood by it.

Most communities or neighborhoods of communities are not so different from those in SLS. Our public libraries serve as many as 61,000 people and as few as 300. Some of our academic libraries are large four-year institutions, some are junior colleges, and some are small private ones. Our schools serve a few thousand or a few hundred. Among SLS special libraries, only the hospital libraries have similar missions. And not one of those 275 libraries feel they are anything like another. Each has its own unique community of users, its own unique personality. And yet we have found some common ground on which to measure ourselves, and have determined that we will not hide behind our individuality and lose an opportunity to examine, and hopefully improve, our reference services in SLS.

The mid-1990s may see SLS libraries with a dramatically different set of standards than we now have—or with no standards at all. But, come that time, we will have done what we set out to do: have the evidence on which to base a responsible choice.

In a recent article, Herbert S. White (1989), commenting on the library world's negative reaction to standards, said the response was too often "what we have 'meets the needs' because, after all, it is what we have" (p. 62). Not if we can help it, Herb White, not if we can help it!



## APPENDIX

Effects of Reference Standards in SLS Public Libraries

## Survey Results: Summer, 1990

In January of 1989, SLS Minimum Reference Standards for Public Libraries, adopted in January of 1986, became effective. Formal evaluation of the standards is scheduled for 1992. This informal survey is indicative of their impact at the half-way point in the process.

Surveys were distributed to 79 member public libraries. Return rate was 81%.

77 responses were received from 64 libraries.

6 libraries sent multiple responses from administrators and department heads responsible for different reference service points. Scores were tallied on a basis of either 64 or 77, as seemed appropriate, and as noted below.

2 of the 5 libraries which do not meet standards responded, and are included in the tally.

RESULTS

1. IN GENERAL, DO YOU THINK SLS REFERENCE STANDARDS HAVE IMPROVED REFERENCE SERVICE IN YOUR LIBRARY? (of 77)
 

Yes: 60 (77.9%)	No: 11 (14.3%)	No Opinion: 6 (7.8%)
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2. WHETHER YOU ANSWERED YES OR NO TO THE ABOVE, WOULD YOU RECOMMEND SOME TYPE OF REFERENCE STANDARDS AS A GOOD IDEA? (of 77)
 

Yes: 69 (89.6%)	Yes, but without sanctions: 4 (5.2%)
No: 1 (1.3%)	No Opinion: 3 (3.9%)
  
3. EVEN IF THERE WERE NO REFERENCE STANDARDS WHICH OF THE FOLLOWING SLS-PROVIDED REFERENCE AIDS WOULD YOU WANT CONTINUED? (of 77)
 

Reference interview workshops for new staff	64 (83.1%)
Other reference workshops for all staff	71 (92.2%)
Core Reference List for Public Libraries	67 (87%)
Manual: "Evaluation of Reference Services"	46 (59.7%)
Workshops/Samples of reference policies	40 (51.9%)
Regular visits to library by SLS staff	34 (44.2%)
  
4. IS THE CURRENT ANNUAL REPORT FORM CONVENIENT FOR YOU TO FILL OUT? (of 77)
 

Yes: 62	No: 1	No Opinion: 14
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## APPENDIX (Cont.)

5. WHICH OF THE FOLLOWING DID YOUR LIBRARY HAVE TO DO IN ORDER TO MEET REFERENCE STANDARDS? (of 64)

Write a reference policy	57 (89%)
Make plans to evaluate your reference service	46 (71.9%)
Purchase new titles to meet Core Reference List	32 (50%)
Adjust scheduling to provide time away for continuing education	31 (48.4%)
Make new efforts to acquire local government documents	23 (35.9%)
Make new efforts to acquire information on local organizations	21 (32.8%)
Acquire equipment to access online bibliographic databases (SWAN/IO)	15 (23.4%)
Retain longer runs of newspapers	13 (20.3%)
Change staffing in order to provide trained staff at all hours library is open	13 (20.3%)
Change job descriptions in order to meet formal education requirements of standards	9 (14%)
Acquire a typewriter or electronic equivalent	6 (9.4%)
Add a telephone to the reference area	3 (4.7%)
Get authority to make telephone calls within the Chicago metropolitan area	2 (3.1%)
Acquire or move a photocopy machine for easy access	1 (1.5%)

Only one of the 64 libraries had to do nothing in order to meet standards.

Of the 5 libraries which do not meet standards, 1 does not have online access to a bibliographic database (responded), 1 does not have trained staff on duty on Sunday (responded), 1 has not purchased all titles on Core List nor completed required workshops (no response), and 2 have not submitted any reports indicating whether or not they meet standards (no responses).

## 6. PLEASE RATE THE IMPORTANCE OF EACH OF THE FOLLOWING REQUIREMENTS TO GOOD REFERENCE SERVICE IN YOUR LIBRARY. IT SHOULD MAKE NO DIFFERENCE IN YOUR RATING WHETHER YOU MET THOSE REQUIREMENTS BEFORE OR AFTER THE IMPLEMENTATION OF REFERENCE STANDARDS. (of 77)

Please note that the chart on the following page tallies answers in percentages only.

## APPENDIX (Cont.)

ALL FIGURES = % OF TOTAL RESPONSES	Vitally Important +	Very Important +	=	→	Important +	=	No Effect +	Negative Effect +	=	No Answer
<b>POLICY</b>										
1. Process of development	13	44	57		32	89	6	-	6	5
2. Having written policy	38	31	69		25	94	3	-	3	3
3. Evaluation of reference service	22	39	61		31	92	3	-	3	5
<b>STAFF</b>										
1. Formal educ. requirement	30	39	69		19	88	5	3	8	4
2. SLS orientation session	16	49	65		27	92	3	-	3	5
3. Interview workshops, all staff	23	40	63		31	94	3	-	3	3
4. Four sources workshops, paraprofessional staff	22	38	60		31	91	5	1	6	3
5. SLS continuing educ. workshops, all staff	23	47	70		25	95	-	-	-	5
6. Cont. educ. requirement	21	34	55		36	91	1	1	2	7
7. Provision of in-house training	26	32	58		31	89	4	1	5	6
<b>MATERIALS</b>										
1. Acquisition of titles on core reference list	34	31	65		25	90	5	3	8	2
2. Acquisition of local govt. documents	13	30	43		47	90	5	-	5	5
3. Acquisition of info. on local organizations	13	42	55		36	91	5	-	5	4
4. Required retention of back files of newspapers	9	27	36		44	80	12	-	12	8
<b>EQUIPMENT</b>										
1. Easy access to telephone	71	17	88		5	93	4	-	4	3
2. Authority to make calls in metropolitan area	56	27	83		8	91	4	-	4	5
3. Easy access to typewriter	35	31	66		23	89	8	-	8	3
4. Easy access to photocopy	43	36	79		13	92	5	-	5	3
5. In-house access to bibli- graphic database (SWAN/10)	56	26	82		14	96	1	1	2	2



## APPENDIX (Cont.)

## 6. (cont.)

Additional Note to Chart: For some items, it seemed valuable to tally ratings of a subset of libraries which had to adjust scheduling, budgets, space, or procedures in order to meet the particular requirements (see Question #5).

Half of the ratings were surprisingly similar, using either the total responses or the subset as a base. Those which indicated more than a 10% difference in the "vitality/very important" rating are:

	Vitality/Very Important (%)	No/Negative Effect (%)
	Total/Subset	Total/Subset
Requirement for Formal Education	69/80	8/0
Interview Workshops	63/42	3/0
Reference Sources Workshops	60/42	6/0
Continuing Education Workshops	70/59	2/0
Local Government Documents	43/58	5/0
Information on Local Organizations	55/68	5/6
Retention of Newspapers	36/47	12/15

Most of the percentages unaccounted for above were rated in the "Important" column; a few had no opinion.

The numbers of libraries which had to acquire equipment were too small to make valid comparisons. The only exception was the 15 libraries which acquired equipment to access online databases. 82% of them rated that element as vitality or very important, exactly the same as the rating from total responses.

2 libraries which had to write a policy felt it had no effect on their services.

1 library which had to purchase titles on the Core List felt it had no effect on service; another felt it had a negative effect because of cost.

## 7. OTHER COMMENTS WRITTEN ON SURVEYS:

*In response to "Which of the following did your library have to do IN ORDER TO MEET reference standards?":*

"We purchased a few titles to meet the standards but also used the list to expand our holdings further."

"The best method of evaluating reference service is yet to be decided. Do you plan to recommend something system-wide?"

"As a small suburban library, I appreciate having a standard to measure against our reference collection—even though it can be a juggling act to cover the cost."



## APPENDIX (Cont.)

"We have always sent people to workshops, but now we are making more of an effort to make sure that everyone goes to at least 2 a year--and of course there are more available now."

"Writing a reference policy was very worthwhile in terms of deciding just what we will do and standardizing how we treat patrons. It was also a good cooperative project for the Adult and Young People's Services Department."

"Obtaining local documents has been far more difficult than we expected. It took nearly two years to receive current minutes of City Council meetings from XXXXXX, and we still don't have a complete set of ordinances from either XXXXXX or XXXXXX. Apparently, neither City Hall believes the library does more than just hand out Danielle Steel novels and host Story Hours for preschoolers."

"We don't do very much reference work at this library, but all the various steps the staff has gone through to meet the standards has made them more aware of the importance of reference service and more familiar with our reference collection."

"An essential aspect of reference to emphasize in continuing education is familiarity of electronic reference sources available, best utilization of such, budget concerns, management of such services and current display and information about such as electronic encyclopedias, video-audio technology, etc. Which is most cost effective? Which is the best to use to fulfill information requests? Update on a nationwide standard of information format. A budget plan to introduce electronic sources each year in a long range plan. Helping our youth to be aware of electronic availability of resources. When and how to use electronic information and critical decision making of which is best to use and digest at critical points of needs. Helping our youngsters become computer literate in knowing what to use, when, how?"

"We changed staffing and scheduling so that there is a more even distribution of those trained in reference."

"Writing the Reference Policy was the most difficult part. The whole staff contributed and it made us all more aware of our policies and able to be more consistent in our answers to patrons."

"Many of the books required have proven totally irrelevant to a library of our size and a community of our type."

"We held staff inservice training to use the new reference material and make better use of what we already had." (from a library which does not meet standards)

"We are always informally evaluating our reference service. The standards now make us do so formally."

"Since XXXXXX came aboard as our new director, we have added a reference desk complete with telephone, CLSI terminal with DIALOG compatability, increased our core reference collection substantially, added MLS trained librarians for around the clock coverage. I believe we have made enormous strides toward meeting reference standards in the past three years!"

"Frankly, I always fear something on the core reference list has gotten out of date with me forgetting to replace it. Chases's Annual Events remains for me the most delightful and important discovery on the list."

## APPENDIX (Cont.)

*In response to "Even if there were no reference standards, which of the following SLS-provided reference aids would you want continued?":*

"This is a loaded question. All of the above are or have been helpful to a degree. But the 'Core List,' for example, as a requirement is different than a 'Suggested List,' that might be just as helpful."

"We have become increasingly aware of the depth of our own collection. With the new additions to our collection and the training of the staff we are able to answer the reference questions that are asked of us. Please keep in mind that the role we have chosen is a Popular Materials Library." (from a library which does not meet standards)

"Serving as a member of the 1990 Core Reference Committee was a pleasant and profitable experience for me. I learned so many things from my colleagues about reference sources and methods of service. It is an ideal way to up-date and develop one's own reference collection."

"Rather than just continue the requirements should be strengthened."

"Bibliographies in various subect fields of recommended titles to help small libraries in adding depth to their collection--the opinion of SLS peers would be more valuable to us than many printed bibliographies in books."

"Besides Core Reference Lists I would like to see suggestions for reference material that you have found useful, even though not required."

"This year's workshops had few of relevant value. Perhaps more on basic reference sources and tips and less on hi-tech and interviews."

"Evaluation of Reference Services for Youth Services Dept."

"We love all SLS-provided reference aids."

"Workshops are fine if they are on a subject you need--but to take a workshop for a requirement has a negative effect."

"The existence of written Reference Standards makes it easier to justify the Reference budget to library trustees; one can defend expenditures by arguing that 'we have these system reference standards to uphold...'"

"Reference workshops should be provided, but workshops should be offered IN SEVERAL SESSIONS for professional staff. So far, I've seen little of this."

"Even more meaningful than educational requirements is the hands on experience of staff--whether through SLS workshops or in house training."

"How often is a library visited? How is the schedule of visits decided?"

*In response to "In general, do you think SLS reference standards have improved reference service in your library?":*

"They keep us from losing sight of some basic things we need to maintain."

"Yes, but we were thinking along the same lines anyway. However, the workshops provide CE that we couldn't do on our own."

## APPENDIX (Cont.)

"Found several good titles on core list."

"Seem to apply to small libraries."

"No, we have no SLS backup." (from a library which does not meet standards)

"Cannot evaluate, as very few changes were needed."

"If nothing else, just looking at and thinking about reference service is a great exercise. But the SLS standards have value beyond that. We're lucky to have them, even if we all do complain a little."

*In response to "Whether you answered Yes or No to the above, would you recommend some type of reference standards as a good idea?":*

"Guidelines yes/standards no!"

"Maybe called guidelines."

"Yes, I merely disagree with penalty. Knowing the norm is valuable; following like sheep is thoughtless." (from a library which does not meet standards)

*In response to "How do you think SLS standards could be more effective?":*

"By SLS helping (financially, if necessary) those libraries who do not meet standards. I strongly disagree with the process of denying service to any SLS library. SLS was founded to help libraries--not to punish them."

"Continue revisions of core list (two year intervals). Help libraries evaluate their reference service. A uniform method would be of greatest value."

"When I first dealt with the many pages of the core reference list I wished it could be published on interactive software for much greater ease of maintaining and upgrading the collection as well as budgeting! I still think it's a great idea..."

"The best way would be in terms of available consultation with SLS personnel so our standards could be better updated. Perhaps we could reserve at least 1 session annually of the Zone Reference Librarians' meetings for standards and one annual session (at least) for evaluation stats."

"Provide fewer workshops of higher quality and help the instructors by providing an outline of what to cover in workshops. There is an unevenness in the quality unfortunately."

"As long as member libraries are relatively autonomous, I doubt there is much more that can be done. I worry a bit about running out of new workshops for long-term SLS librarians, but continuing education (or just battery-recharging) is a real need. The fact that patrons are still being referred to us for help or materials they could have gotten in their own libraries bothers me, so may need to look at ways to reinforce training."

"They will be effective if they are enforced. Each library should assume its own responsibility in seeing that the SLS standards are met. Yet, we still need reminders that we are keeping in step with the standards."

## APPENDIX (Cont.)

"Insist that academic libraries meet the same standards as the SLS public libraries."

"Standards should be re-evaluated for fairness to smaller libraries. Cutting them off from Reference Service assistance is a double punishment--they are the libraries who need it most. Also, the original concept was to set up standards to strive for and guidelines to good service--'what should we be doing?'--not what must we do."

"Sensitivity to the limitations in staff and reference materials of smaller, poorer libraries."

"Youth reference questions are a very important aspect of reference service. Consideration in training, input, etc. should always have a youth services librarian representative."

"The Head of Reference reports that the workshops are especially useful. She also recommends that workshops be offered on the subjects of business and legal resources, the two areas where staff have most expressed a need."

"Certain portions should be based on population and budget. The truly 'poor' library in a small population certainly doesn't require as much as a larger population needs."

"I think a workshop in 'writing winning proposals' would be valuable in helping us make our case with our boards."

"Basic Standards should be expanded. For example: long distance phone calls, large core list, immediate access to SWAN terminal, etc. It might be useful to have some standards cover the quality of the actual reference work, in addition to the collections and equipment."

"Divide standards by size of population served with varying degrees of standards."

"For those libraries that rely on Reference Service, the comments that I hear are that the service is slow and sometimes inadequate or nonexistent." (from a library which does not meet standards)

"They would be more effective if they took the conditions of the small libraries into consideration, e.g. Reference person on duty all open hours; on-line capability; and core reference."

"Reference standards currently require that the Reference Role be one of the top three roles for every library--it is not one of ours by action of the Board." (from a library which does not meet standards)

"I think continuing education for all professionals is a necessity. Technology is moving so rapidly--we all need help in keeping up-to-date."

"Perhaps if there were more distinction between the size of a library and the specific requirements."

"Provide more reference workshops pertaining to public libraries."



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